



ACES 2013 Progress Review Job Aid

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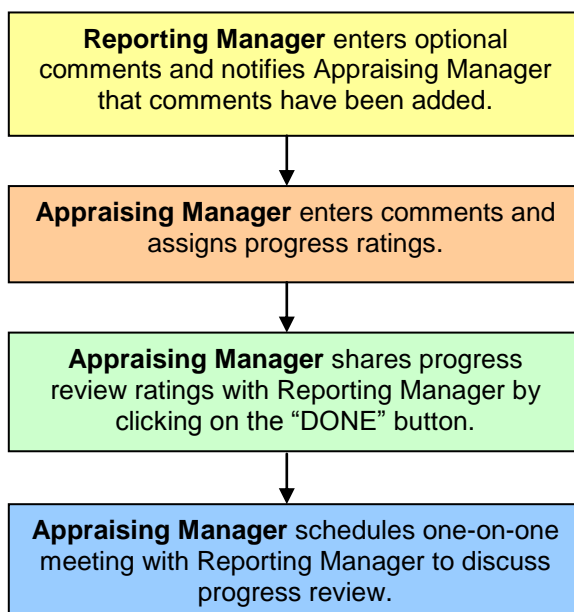
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This job aid can be found on HRD's 2013 Progress Review Stage page at:
<http://www.mass.gov/anf/docs/hrd/policies/aces/2013/progress-job-aid.doc>


A) [Role Definitions and Process Flow](#)

Role	Definition
Reporting Manager	The manager being reviewed and reports to the Appraising Manager.
Appraising Manager	Completes the review of the Reporting Manager and reports to the Reviewing Manager.

Progress Review Process Flow Diagram



B) [Technical Tips](#)

- **Timeout Message - Save your work every 10 minutes!** Your ACES Online session **will time-out after 30 minutes of inactivity**. Since text entry is not registered by the system as activity, be sure to save your work by clicking on the save icon  in the upper right corner of the form every 10 minutes. Clicking **OK** on "Message from webpage" dialog box will re-start the 30-minute clock for timeout purposes, but will not save your work on the form.




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- ❑ **Forgot Your Password?** If you forget your password, navigate to the ACES Login page at <https://performancemanager4.successfactors.com/login?company=MA&>, click on “**Forgot Your Password?**” link, enter your Employee ID and click on “**Email Me**”. The system will reset your password to a system-generated password. Upon logging in, you will be required to choose a new password by first entering your system generated password and then entering your new password twice.

Username:

- ❑ **Did Not Receive Email or Your Account is Locked?** Notify your [Agency ACES Coordinator](#) if you do not receive your login information. If you’ve tried logging in five times with the wrong password, your account gets locked. Your [Agency ACES Coordinator](#) can unlock your account.

 **You’ve reached the maximum number of login attempts. Your account is now locked. Contact your administrator for more details.**

Username:

Password:

[Forgot Your Password?](#)

- ❑ **Screen Resolution:** The recommended screen resolution to maximize the amount of the form displaying on the screen while minimizing scrolling is 1024x768. You can change this resolution in your control panel on your computer under settings, display options. Consult your IT unit for technical assistance.
- ❑ **Form Editing.** Since the form is in both the inbox of the reporting manager and appraising manager at the same time, only one person can be editing the form at a given time. You will receive the following error message if you try to edit a form while it is being edited by the other manager.

Properties

The form is currently locked because another user is editing it. Please try again in 120 minutes.

Locked By: Reporting Manager (2013-04-29 08:37:20.0)
Form creator: Amy Lynch
Subject: Reporting Manager
Type: Form
Title: 2013 ACES Form for Reporting Manager
Due Date: 10/04/2013
Status: Modify Stage

C) [Logging into ACES Online](#)

1. In your Internet browser, navigate to <https://performancemanager4.successfactors.com/login?company=MA&>

Tip:	Make sure to bookmark this page for quick access on your next visit. In Internet Explorer, click on Add to Favorites in the Menu bar, and then click on the Add button.
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Please enter your login information below. Both your username and password are case sensitive.

Username:

Password:

[Forgot Your Password?](#)

2. Type your Employee ID in the **Username** field.
3. Type your current password in the **Password** field.
4. Click on the **Login** button, or press the **Enter** key. The ACES welcome page opens.

D) ACES Form Icons



Several icons appear in the upper right corner of the 2012 form.



View option - Allows users to view full form or only one section at a time.



Spell check (entire form)



Print form



Print Setup (select HTML printing)



Save entire form (Click this button every 10 minutes to save your work)



Form history (click on this link to access a copy of previous forms such as **ACES 2005-ACES 2012 forms**.)



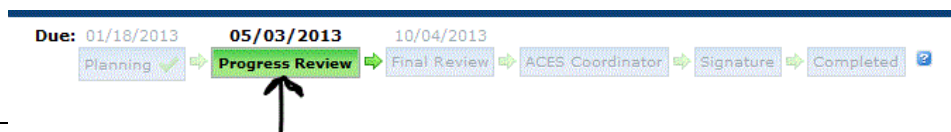
Note history (click on this link to access a copy of previous notes)



"i" - Information button; shows audit trail of where form has been and where it is going to next.

E) Reporting Manager Instructions

1. Click to the **My Forms** tab.
2. Find your ACES form. Click on the link to access your form.
3. The route map at the top of your form will be highlighted in green to indicate the current stage of your ACES form.





ACES 2013 Progress Review Job Aid

Note:

Due: 01/18/2013

05/03/2013

10/04/2013

Planning



Progress Review



Final Review



ACES Coordinator

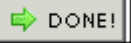


Signature



Completed



If the **Planning** box is highlighted in green, ask your appraising manager to move the form to **progress review phase** by clicking on the “**DONE**”  button.

4. Review the **PROGRESS REVIEW INSTRUCTIONS** section to review the steps that need to be completed for this phase. Enter optional comments in the **Progress Review Comments by Reporting Manager** field for each **Manager Objective**.

I. Manager Objectives

I. Manager Objectives (Planning, Progress Review and Final Review)

Reporting Manager enters between 2 and up to 4 SMART (specific, measurable, achievable, realistic, and timebound) objectives. Milestones are optional and may be added and updated at any time throughout the review cycle. Assign a weight to each objective; weights of manager objectives must add up to 100%.

For additional help on entering objectives, please visit HRD's [ACES 2013 Planning Stage](#) page.

1.1	Remove Objective
Objective: Ensure 95% of participants in supervisor certificate program satisfactorily complete classes and mandatory training courses by 5/30/2013	Weight (%) 60
Milestones	
Add Milestones	
Progress Review Comments by Reporting Manager	
Everything is on track so far. 85% of the participants have completed the requirements; have contact the remaining participants to ensure completion. Only 1-2% of participants have indicated they cannot complete their requirements.	
spell check	

5. Review and update any milestones, if needed.
6. Click on hyperlink in left margin, **Progress Review Overall Rating and Comments**
7. Enter optional comments in the **Progress Review Overall Rating and Comments** section.

**IV. Progress Review
Overall Rating and
Comments**

IV. Progress Review Overall Rating and Comments

For additional help on selecting a Progress Review Overall Rating, please visit HRD's [2013 ACES Progress Review](#) page.

The Writing Assistant and Coaching Advisor tools are resources that can help you with ideas for comments related to specific skills and development tips. You can copy appropriate text and paste it into the comments box then edit comments as needed.

Progress Review Overall Rating

Comments by Reporting Manager:

I have strived to meet all deadlines in an environment where priorities sometimes change. The course evaluations thusfar have been positive. Once the program wraps up in June I will be able to devote more time and resources to program ABC.

[writing assistant](#)
[spell check](#)

8. Click on spell check icon at top of form to complete a **spell check** of the entire form.
9. Click on save icon at top of form to **save** the entire form.
10. Inform your Appraising Manager that you have finished entering comments onto your ACES form for **progress review phase**.



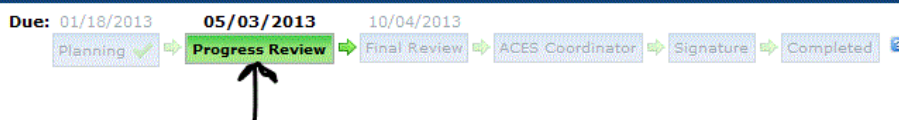
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F) Appraising Manager Instructions

Important Note:

The ACES form is simultaneously in the inbox of the appraising manager and reporting manager. When the form is in **progress review phase**, the appraising manager will be able to view reporting manager progress review comments. However, the reporting manager will not be able to see appraising manager progress review ratings and comments until the appraising manager closes the progress review phase by clicking on the **DONE** button.

1. Click to the **My Forms** tab.
2. Locate your Reporting Manager's ACES form and click on the link to access the form.
3. Verify that the form is in the **Progress Review Phase**. The Progress Review phase box will have green backfill. If form is already in **Progress Review Stage**, skip to step 5.



4. If the form is in the **Planning Phase**, click on the “**DONE**” button to move the form to **Progress Review Stage**.



5. Click on the **Manager Objectives** button in the Left Navigation bar.
6. Review the comments (if any) by your Reporting Manager in the **Progress Review Comments by Reporting Manager** field under each **Manager Objective**. If applicable, add any comments to the **Progress Review Comments by Appraising Manager** section.

Progress Review Comments by Reporting Manager
Everything is on track so far. 65% of the participants have completed the requirements; have contact the remaining participants to ensure completion. Only 1-2% of participants have indicated they cannot complete their requirements.

Progress Review Comments by Appraising Manager
Reporting Manager's organizational skills and time management skills have resulted in smooth administration of the program. She has made a concerted effort to develop a rapport and ensure ongoing communication with both instructors and participants.

7. From the **Progress Rating** dropdown, select the appropriate rating for each **Manager Objective**: **Above Target**, **On Target**, **Below Target**, or **Not Applicable**.

1.1	
Objective:	
Ensure 95% of participants in supervisor certificate program satisfactorily complete classes and mandatory training courses by 5/30/2013	
Milestones	
Progress Rating	On Target
Progress Review	Please Select Rating
Progress Review	Everything is on track
Progress Review	Below Target
Progress Review	Not Applicable
Progress Review	Above Target

Note:

For more information on rating definitions, click on the link below:
<http://www.mass.gov/anf/docs/hrd/policies/aces/2012/aces-definitions-progress-review.doc>

Click on the **Progress Review Overall Rating and Comments** button in the Left Navigation bar.

IV. Progress Review
Overall Rating and
Comments



ACES 2013 Progress Review Job Aid

8. Review the comments (if any) by your Reporting Manager. Enter comments in the **Progress Review Overall Comments** field.

9. Using the drop down arrow, select a rating for the **Progress Review Overall Rating**: **Successful Performer**, **Satisfactory**, or **Below Expectations**.

Note:

For more information on rating definitions, click on the link below:
<http://www.mass.gov/anf/docs/hrd/policies/aces/2012/aces-definitions-progress-review.doc>

10. Click on spell check icon at top of form to complete a **spell check** of the entire form.
11. Click on save icon at top of form to **save** the entire form.
12. At the top of the form under the **route map** or at the bottom of the form, click on the **DONE** button. A new window will open where you can enter optional comments to include in the email notification. These comments will not appear on the form. The form will now move to **final review stage** where it remains until final reviews begin in September 2012. Your reporting manager will receive an email notification indicating that the progress review stage has been completed.
13. Click on the **DONE** button to close the **Progress Review Stage**.

If in the process of completing the above step you realize you need to re-access the form, click on **Cancel & Return to Form** button to cancel moving the form to **Final Review stage**.

14. Schedule a one-on-one meeting with your reporting manager to discuss his/her progress review ratings.